

Electronic Resources Management

for Small Libraries using Alma

Angela Vetsch
Digital Services Coordinator



UNIVERSITY OF MINNESOTA MORRIS
Driven to DiscoverSM

University of Minnesota Morris

Rodney A. Briggs Library

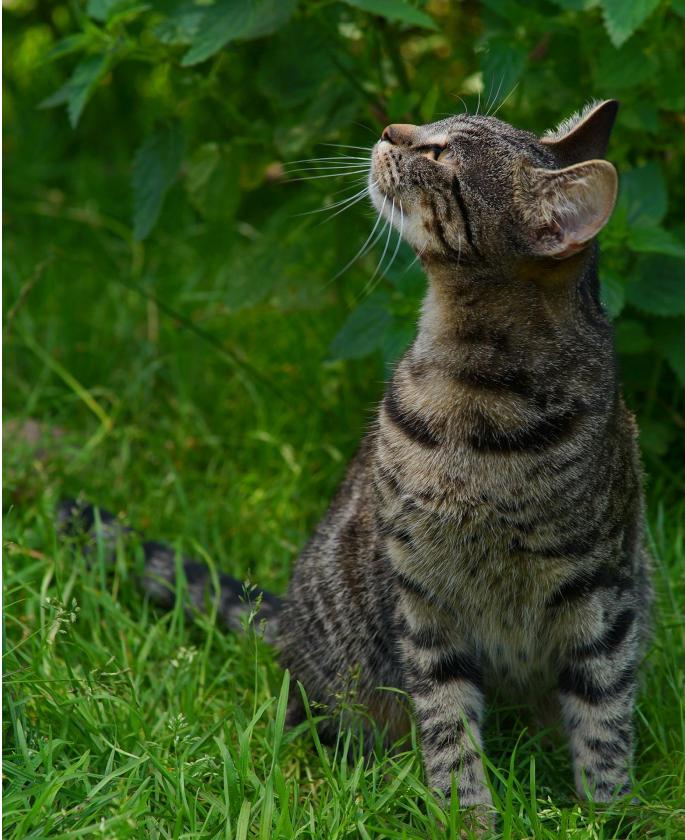
Small public liberal arts in
rural west-central Minnesota



Congratulations of making it through migration!



Change is hard work!



Managing Expectations

You cannot learn everything all at once.

Embrace the unknown.

Curiosity: careful and calculated.

Ask for help.

Managing Electronic Resources: Our Structure

- Four(+) people involved in process
- Group decisions for acquisitions and renewals
- Operating within the University of Minnesota system



Organize the Chaos: Tools for Project Management

- Tools in Alma
- Management softwares (Trello)
- Spreadsheets & Google Sheets
- Forms (a survey or Google Forms)
- Diagrams & flow charts



Identify the Big Pieces of Your Workflows

Possible examples:

- Acquisitions
- New electronic resource activations
- Linking/Link Maintenance
- Clean-Up Projects
- Troubleshooting



Big Pieces: Example - Activating EResources

Helpful Vocabulary

Managing Electronic Resource Activation:

Electronic Resource Activation Task List

Institution Zone, Network Zone, & Community Zone

Electronic Collection & Electronic Portfolio



Big Pieces: Example - Activating EResources

- What are the financial details?
- Are there records available?
 - Leverage the network zone and community zone
 - Load records
- Are there special linking requirements?
- Are proxy configurations needed?
- Does anyone need notification upon completion.



Briggs Library: EResource Activation Process

New EResource

- Resource evaluated by Council
- License negotiated
- Payment Sent

Access to ER is Available

- ER is added to Proxy
- Friendly URL is created

Notify librarians ER is ready:

- *Add to A-Z List
- *Add to LibGuides
- *Liaison--Notify Departments

Alma

Create order/Inventory

- Select CZ Record
- Click "Order" & Attach POL
- DO NOT activate access
- Change ERATL to: **Waiting for Access or Proxy** & Assign to: Digital Serv. Coord.

After Access is Available

- Change ERATL to:
Waiting for Activation (Alma) & Assign to:
Serials manager

Activate in Alma

- Add campus/group setting
- Test access
- Change ERATL to: **Waiting for PCI verification** & Assign to: Digital Serv. Coord.

Primo Central Index (PCI)

- Activate in PCI if collection is indexed and available.

Big Pieces: Example - Activating EResources

Sample workflow & checklist

Action	Person Responsible	Initials/Date Completed
Resource Identification		
Resource Evaluation		
License and Cost Negotiations		
Invoice and Payment		
Resource available -- notify staff		
Admin account created/password stored securely (Password Safe)		
EZproxy Configurations		
Friendly URL Creation		
Add to AZ List		
Alma Activation and create/attach discovery record		
Primo Central Index (PCI) Activation		
Contact Faculty/Discipline		
Advertise Electronic Resource Availability		
Add Electronic Resource to LibGuides		



Some of the Specifics in Alma

- Discussion about which collection to activate
- Actual activation
- Checking on the linking & settings at various levels
 - Collection Level-->Service Level-->Portfolio Level
- Reviewing Activation



Big Pieces: Example - Linking/Link Maintenance

- Local collection
 - Need to check linking manually
- Community Zone Collection
 - Community Zone Update Task List goes over link changes

Tip:

Export the portfolio list into a spreadsheet
for project management



Big Pieces: Example - Clean Up Projects

- Discovery Records / Databases
- Individual Portfolios without collections
- ebooks with link-in-record
- PO Lines (migration or otherwise)
- Specific Collections by vendor



Big Pieces: Example - Troubleshooting

Google Form collects
information on:

- Resource & Vendor
- Citation Details
- Issue Description
- Record Details
- Patron follow-up

And saves it results in a sheet!

The screenshot shows a Google Form titled "EResource Issues". The form includes a note at the top: "Please record issues with access to Electronic Resources. NOTE: Not all Fields Required. Some situations may be specific to journals whereas others are specific to a database or even a vendor." Below the note are three text input fields with placeholder text "Your answer".

Field	Placeholder Text
Vendor of Resource:	Your answer
Name of Database/Collection:	Your answer
Journal Title/Portfolio/ISSN:	Your answer

Review: Big Pieces

What big pieces did you write down at the beginning of the session?

Are some projects time sensitive?

What projects are easy to accomplish? Can anything be delegated?

Little Pieces: Ask for help!

- Alma e-mail List
- Alma Help Documentation
- Local EResources e-mail list
- Colleagues at other institutions using Alma
- CARLI Folks



Thank You!

Questions? Comments?



Resources:

Alma CKB Documentation:

[Activating electronic resources](#) and [Managing Electronic Collections](#)

Further Reading:

Carter, S., & Traill, S. (2017). [Essential skills and knowledge for troubleshooting e-resources access issues in a web-scale discovery environment](#). Journal of Electronic Resources Librarianship, 29(1), 1-15.